California Department of Education
Human Resources Division
HRD-002 (Revised 06/2024)

☐CURRENT
☒PROPOSED

PR LOG #:

DUTY STATEMENT

CIVIL SERVICE CLASSIFICATION	WORKING TITLE
Senior Legal Analyst	Senior Legal Analyst

BRANCH
Legal, Audits and Charter Branch

DIVISION	OFFICE
Legal Operations Management	Legal Support Services

CBID	WWG	PCN	POSITION NUMBER	SPECIFIC LOCATION
R01	2	3384	174-071-5333-002	Sacramento

PROBATIONARY PERIOD	TENURE	TIME BASE	BILINGUAL POSITION
6 Months	Permanent	Full-Time	No

TELEWORK OPTION	SAFETY SENSITIVE POSITION	CONFLICT OF INTEREST CLASSIFICATION
Hybrid	No	Yes

DIRECTION STATEMENT AND GENERAL DESCRIPTION OF DUTIES

The Senior Legal Analyst performs advanced journey-level analytical and legal support work involving complex, sensitive, and high-profile legal matters, including litigation, subpoenas, service of process, Public Records Act requests, litigation holds, case reviews, and legal research. The incumbent exercises a high degree of independent judgment and discretion in interpreting and applying statutes, regulations, policies, and procedures to unique situations and special assignments. As the lead analyst on assigned matters, the incumbent manages and coordinates complex case activities, determines and implements effective workflows, and ensures compliance with legal and organizational requirements.The incumbent serves as a subject matter expert in litigation support and records management practices, utilizing document management systems, information management databases, and other specialized software applications to support legal operations and achieve efficient, effective case outcomes. Responsibilities include conducting legal research and analysis, overseeing document collection and production efforts, coordinating electronic discovery activities, and ensuring the accuracy, organization, and quality control of legal records and data.

CONDUCT, ATTENDANCE, AND PERFORMANCE EXPECTATIONS

All employees are expected to work cooperatively with others, maintain regular, consistent, predictable attendance, and possess integrity, initiative, dependability and good judgment.

SUPERVISION BY

Under direction of the Supervisor I of the Legal Operations Management. May receive direction from the Supervisor I of the Administrative & Technical Operations or Manager II of the Legal Operations Management.

SUPERVISORY RESPONSIBILITIES

None but may act in the lead capacity to other analysts in the unit on projects.

WORKING CONDITIONS AND PHYSICAL REQUIREMENTS

This position requires long periods of time sitting in front of a computer workstation; repetitive use of hands, forearms, and fingers to operate computers, mouse, dual computer monitors, and printers; must be able to organize and prioritize their work under deadline situations and adapt behavior and work methods in response to new information, changing conditions or unexpected obstacles.

ESSENTIAL/NON-ESSENTIAL FUNCTIONS

Relative % of Time Required: 45%	☒ Essential Function	☐ Non-Essential Function

Duties Performed

Analyzes citations in pleadings to verify the accuracy of cited authorities and ensures citation format complies with California Style Manual (CSM) or the Bluebook citation style; researches, analyzes, and applies appropriate court rules to file and serve in accordance with applicable laws and court rules; analyzes pleadings to ensure content accuracy and formatting compliance with applicable laws and court rules; analyzes collects, locates, and indexes case-related information and material. Drafts effective written legal memorandum recommending course of action, correspondence, and emails, drafts legal pleadings in very complex, sensitive and varied program areas requiring detailed legal and client knowledge; summarizes subject interviews, deposition, and trial transcripts; assists in developing litigation plans; creates systems for managing discovery and litigation documents/information; interviews witnesses and drafts interview summaries; drafts declarations; gathers documents; analyzes and summarizes trial evidence; and develops and makes recommendation for case management strategies. Understands the application of relevant law, statutes, and court decisions in the most complex investigations, injunctive proceedings, trials, civil judicial review arising out of administrative litigation, writs, appeals, administrative hearings, and subpoenas.

Relative % of Time Required: 25%	☒ Essential Function	☐ Non-Essential Function

Duties Performed

Consult with attorneys on all aspects of eDiscovery, from identification, preservation, collection, and document review to production. Assists attorneys in creating concepts and strategizing on data collection methods. The incumbent organizes the data and consults with the legal team on strategies to search, filter, review, and produce data. Maintain and track the chain of custody to ensure the data is handled properly. Reviews and monitors invoice reports received from the Attorney General's office to ensure that the case activity reported is appropriate. Public Records Act: Regularly and independently performs the analysis and drafts an appropriate response on legal issues, including requests for release of records under court order, subpoena, and the Public Records Act. Obtain and analyze records and other evidence received from local and state agencies, complainants, and discovery responses to support all aspects of litigation related to employee discipline matters. Independently investigate and analyze facts and documents produced in both formal and informal discovery in connection with litigation, court orders, and court proceedings. Conduct legal research using all available electronic databases (e.g., Westlaw, Lexis Nexis, California Legislative website, Superior Court websites, State Personnel Board, etc.) by reviewing case law, statutory and regulatory authority, legislative history, and secondary sources.

Relative % of Time Required: 15%	☒ Essential Function	☐ Non-Essential Function

Duties Performed

Analyzes legislation and regulations; drafts legislative analyses; monitors progress of proposed legislation and regulations; and research, analyzes, and makes recommendations regarding statutes, regulations, and case law authority relating to specific issues and makes recommendations. In concert with an attorney, develops paralegal training material in legal topics, including pretrial and trial assistance for attorneys, motion drafting, and discovery. Trains new legal analysts and legal assistants. Handles a variety of general administrative matters and special projects as assigned including continually updating training materials and law libraries as laws and policies change. Participates in regular staff meetings, training sessions, and case status meetings.

Relative % of Time Required:	10%	☒ Essential Function	☐ Non-Essential Function

Duties Performed

Provide assistance with document formatting as requested; assist in the maintenance and updating of electronic tracking systems for internal Legal Office functions. Provides assistance to legal staff on other issues as assigned. Assist with special projects or with other duties assigned by the Supervisor I, Attorneys, Assistant General Counsels, or the General Counsel.

Relative % of Time Required:	5%	☒ Essential Function	☐ Non-Essential Function

Duties Performed

Serves as a backup to other analysts by performing a variety of operational and program support functions. Participates in cross-functional teams and special projects involving research, analysis, evaluation, and organization of data and information. Develops, drafts, and reviews reports, summaries, correspondence, and other documentation. Performs other duties and functions, which may be required to support the overall mission, goals, and objectives of the Department.

Relative % of Time Required:		☐ Essential Function	☐ Non-Essential Function

Duties Performed

SPECIAL/ADDITIONAL REQUIREMENTS AND DESIRABLE QUALIFICATIONS

Basic legal concepts, terminology, principles, and procedures; use of legal reference materials; role of a paralegal staff in a legal office.

Ability to:
Reason logically; analyze situations accurately and recommend an effective course of action; write effectively; prepare reports and summary sheets which set forth a statement of the facts, applications of relevant law and conclusions; read and understand statutes, court decisions, legal documents and similar material; prepare drafts of pleadings; draft litigation discovery documents, such as interrogatories and motions; work cooperatively with attorneys, clerical staff, technical staff and the general public. Demonstrated ability to act independently, to communicate effectively both verbally and in writing, and to assume increased responsibility.

PERSONAL CONTACTS

Contact with all levels of Legal, Audits and Charters Branch staff including the General Counsel, Assistant General Counsels, Deputy General Counsels, and Legal Assistants. External contacts include but are not limited to court staff, Department of Justice, and Office of Administrative Hearings.

EMPLOYEE ACKNOWLEDGEMENT

I have read and understand the duties and requirements listed above, and I am able to perform these duties with or without an accommodation. (If you believe an accommodation may be necessary, or if unsure of a need for an accommodation, inform the hiring supervisor or the Accommodations Coordinator at Accommodations@cde.ca.gov.)

EMPLOYEE NAME	EMPLOYEE SIGNATURE	DATE

MANAGER/SUPERVISOR ACKNOWLEDGEMENT

I certify this duty statement represents a current and accurate description of the essential functions of the position. I have discussed the duties of this position with the employee and provided the employee a copy of this duty statement.

MANAGER/SUPERVISOR NAME	MANAGER/SUPERVISOR SIGNATURE	DATE

HRD C&P ANALYST	HRD APPROVAL DATE	EFFECTIVE DATE	DATE UPLOADED

This form will be kept in the employee's Official Personnel File.

Original - Classifications & Pay Office

Copies - Employee and Supervisor

California Department of Education
Human Resources Division
HRD-002 (Revised 06/2024)

☐CURRENT
☒PROPOSED

PR LOG #: FR26-059

DUTY STATEMENT

CIVIL SERVICE CLASSIFICATION	WORKING TITLE
Legal Analyst	Legal Analyst

BRANCH
Legal, Audits and Charters Branch

DIVISION	OFFICE
Legal Operations Management	Legal Support Services

CBID	WWG	PCN	POSITION NUMBER	SPECIFIC LOCATION
R01	2	3384	174-071-5237-xxx	Sacramento

PROBATIONARY PERIOD	TENURE	TIME BASE	BILINGUAL POSITION
12 Months	Permanent	Full-Time	No

TELEWORK OPTION	SAFETY SENSITIVE POSITION	CONFLICT OF INTEREST CLASSIFICATION
Hybrid	No	Yes

DIRECTION STATEMENT AND GENERAL DESCRIPTION OF DUTIES

The Legal Analyst is primarily responsible for analytical work requiring journey level expertise, which includes, but is not limited to, litigation matters, subpoenas, service of process, Public Record Act requests, litigation holds, case review, legal research, tracking, development and analysis of reports and trends. The incumbent is responsible for the use of independent judgment and discretion to interpret and apply statutes, regulations, policies, and procedures to specific situations and special assignments. Successful accomplishment of legal office goals requires the incumbent to maintain regular attendance, communicate professionally, both orally and in writing, and produce accurate work product.

CONDUCT, ATTENDANCE, AND PERFORMANCE EXPECTATIONS

All employees are expected to work cooperatively with others, maintain regular, consistent, predictable attendance, and possess integrity, initiative, dependability and good judgment.

SUPERVISION BY

Under the general supervision of an attorney but may also receive assignments and direction from Supervisor I.

SUPERVISORY RESPONSIBILITIES

None

WORKING CONDITIONS AND PHYSICAL REQUIREMENTS

This position requires long periods of time sitting in front of a computer workstation; repetitive use of hands, forearms, and fingers to operate computers, mouse, dual computer monitors, and printers; must be able to organize and prioritize their work under deadline situations and adapt behavior and work methods in response to new information, changing conditions or unexpected obstacles.

ESSENTIAL/NON-ESSENTIAL FUNCTIONS

Relative % of Time Required: 40	☒ Essential Function	☐ Non-Essential Function

Duties Performed

Maintains electronic and hard copy case files; analyzes citations in pleadings to verify the accuracy of cited authorities and ensures citation format complies with California Style Manual (CSM) or the Bluebook citation style; researches, analyzes, and applies appropriate court rules to file and serve in accordance with applicable laws and court rules; analyzes pleadings to ensure content accuracy and formatting compliance with applicable laws and court rules; analyzes collects, locates, and indexes case-related information and material. Drafts effective written legal memorandum recommending course of action, correspondence, and emails, drafts legal pleadings in very complex, sensitive and varied program areas requiring detailed legal and client knowledge; summarizes subject interviews, deposition, and trial transcripts; assists in developing litigation plans; creates systems for managing discovery and litigation documents/information; interviews witnesses and drafts interview summaries; drafts declarations; gathers documents; analyzes and summarizes trial evidence; and develops and makes recommendation for case management strategies. Independently prepares trial binders that identify all documents, witnesses, issues, and defenses for use by attorneys in planning trial strategy. Understands the application of relevant law, statutes, and court decisions in the most complex investigations, injunctive proceedings, trials, civil judicial review arising out of administrative litigation, writs, appeals, administrative hearings, and subpoenas.

Relative % of Time Required: 35	☒ Essential Function	☐ Non-Essential Function

Duties Performed

Under minimal supervision and with substantial independence, consult with attorneys on all aspects of eDiscovery, from identification, preservation, collection, and document review to production. Assists attorneys in creating concepts and strategizing on data collection methods. The incumbent organizes the data and consults with the legal team on strategies to search, filter, review, and produce data. Maintain and track the chain of custody to ensure the data is handled properly. Reviews and monitors invoice reports received from the Attorney General's office to ensure that the case activity reported is appropriate. Public Records Act: Regularly and independently performs the analysis and drafts an appropriate response on legal issues, including requests for release of records under court order, subpoena, and the Public Records Act. Obtain and analyze records and other evidence received from local and state agencies, complainants, and discovery responses to support all aspects of litigation related to employee discipline matters. Independently investigate and analyze facts and documents produced in both formal and informal discovery in connection with litigation, court orders, and court proceedings. Conduct legal research using all available electronic databases (e.g., Westlaw, Lexis Nexis, California Legislative website, Superior Court websites, State Personnel Board, etc.) by reviewing case law, statutory and regulatory authority, legislative history, and secondary sources.

Relative % of Time Required: 15	☒ Essential Function	☐ Non-Essential Function

Duties Performed

Analyzes legislation and regulations; drafts legislative analyses; monitors progress of proposed legislation and regulations; and research, analyzes, and makes recommendations regarding statutes, regulations, and case law authority relating to specific issues and makes recommendations. In concert with an attorney, develops paralegal training material in legal topics, including pretrial and trial assistance for attorneys, motion drafting, and discovery. Trains new legal analysts and legal assistants. Handles a variety of general administrative matters and special projects as assigned including continually updating training materials and law libraries as laws and policies change. Identifies issues and formulates plan of action for an investigation in consultation with supervising attorney. Interviews witnesses and draft declarations for witness signature. Obtains documents and relates information to the facts of the case. Informs client agency, staff investigators and consultants of attorney directions and recommendations. Independently coordinates input from multiple sources and reports results to attorneys. Research and analyze documents. Submit recommendation to supervising attorney based on investigation. Develops strategies and makes proposals with supervising attorney and informs clients of recommendations to solve problem areas. Participates in regular staff meetings, training sessions, and case status meetings.

Relative % of Time Required:	10	☒ Essential Function	☐ Non-Essential Function

Duties Performed

Review and process incoming mail; maintain Legal Office Library and update legal code books; coordinate Legal Office staff travel arrangements, coordinate office supply orders, and track & process internal transmittals and other staff assignments; provide assistance with document formatting as requested; assist in the maintenance and updating of electronic tracking systems for internal Legal Office functions. Provides assistance to legal staff on other issues as assigned. Assist with special projects or with other duties assigned by the Supervisor I, Attorneys, Assistant General Counsels, or the General Counsel. Perform administrative duties including, but not limited to: adhere to Department policies, rules and procedures; submit administrative requests including leave, travel, and training in a timely and appropriate manner; accurately report time, and submit timesheets by the due date. Serves as backup to the Sections' other analysts, for the full range of their duties that are commensurate with the Analyst classification. May assist in the training of new staff and perform other duties and functions, which may be required to support the overall mission, goals, and objectives of the Department.

Relative % of Time Required:		☐ Essential Function	☐ Non-Essential Function

Duties Performed

Relative % of Time Required:		☐ Essential Function	☐ Non-Essential Function

Duties Performed

SPECIAL/ADDITIONAL REQUIREMENTS AND DESIRABLE QUALIFICATIONS

Basic legal concepts, terminology, principles, and procedures; use of legal reference materials; role of a paralegal staff in a legal office.
Ability to:
Reason logically; analyze situations accurately and recommend an effective course of action; write effectively; prepare reports and summary sheets which set forth a statement of the facts, applications of relevant law and conclusions; read and understand statutes, court decisions, legal documents and similar material; prepare drafts of pleadings; draft litigation discovery documents, such as interrogatories and motions; work cooperatively with attorneys, clerical staff, technical staff and the general public. Demonstrated ability to act independently, to communicate effectively both verbally and in writing, and to assume increased responsibility.

PERSONAL CONTACTS

Contact with all levels of Legal, Audits and Charters Branch staff including the General Counsel, Assistant General Counsels, Deputy General Counsels, and Legal Secretaries. External contacts include but are not limited to court staff, Department of Justice, and Office of Administrative Hearings.

EMPLOYEE ACKNOWLEDGEMENT

I have read and understand the duties and requirements listed above, and I am able to perform these duties with or without an accommodation. (If you believe an accommodation may be necessary, or if unsure of a need for an accommodation, inform the hiring supervisor or the Accommodations Coordinator at Accommodations@cde.ca.gov.)

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MANAGER/SUPERVISOR ACKNOWLEDGEMENT

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MANAGER/SUPERVISOR NAME	MANAGER/SUPERVISOR SIGNATURE	DATE

HRD C&P ANALYST	HRD APPROVAL DATE	EFFECTIVE DATE	DATE UPLOADED
	Jul 16, 2026		

This form will be kept in the employee's Official Personnel File.

Original - Classifications & Pay Office

Copies - Employee and Supervisor